

# CREATING YOUR SCHOOL'S PTA DIRECTORY

## Directory Training Workshop – May 20, 2008

Following are some items to think about when you are creating your school's PTA directory. Remember, there is not just one way to create your directory – keep your own skills and creativity in mind and determine what works best for you, your PTA, and your school.

**Be sure to check with your principal if you make any major content changes from previous years!**

### WHAT DO I INCLUDE IN MY PTA DIRECTORY?

- Determine the purpose of your Directory.
  - Is it strictly a PTA Directory that follows the PTA guidelines;
  - Is it a PTA Directory that includes information that will be helpful to PTA members and distributed only to PTA members;
  - Or is it a School Directory that will include information for the community and is distributed to all families at your school.
- PTA guidelines – As in past years, there will be a set of Area Directory Guidelines distributed from our Area PTA. Any new guidelines will most likely be very similar to the past guidelines and will be available early in the fall. These guidelines tell you what to include in your directory **if you wish to send it in for Area PTA judging**. Even if you don't choose to submit your directory for judging (but you should!), these guidelines are a good source of useful information to include in your directory. Obtain a copy of directory guidelines from your Council PTA ([www.planopta.org](http://www.planopta.org)) or Area 15 PTA ([www.area15.txpta.net](http://www.area15.txpta.net)).
- Helpful Hints for Directory Chairs – *See the most current edition enclosed.*
- School-specific information – Include information that pertains specifically to your school and is great to have at your fingertips; for example:
  - teacher/staff phone numbers, emails and/or photos
  - policies pertaining to student absences, giving students medication at school, doctor visits during school hours, etc.
  - school website (which hopefully includes PTA information!)
  - after school activities and student groups
- PTA Logo – You may use the PTA logo if you wish. Make sure to get the official logo, which is available to be copied from Texas PTA website ([www.txpta.org](http://www.txpta.org)).
- Artwork – Consider what artwork or design, if any, to have on the directory cover or within the directory. Some schools use student artwork within their directories.
- Sponsorships – This is discouraged by Texas PTA. Some PTAs choose to use sponsor listings in their directory for which they charge a fee to include. The purpose is to offset the PTA's directory cost. **If you choose to do this – be careful!** It is best to include a disclaimer in your directory saying that the **PTA does not endorse** the services or products listed. See the comments in the “Helpful Hints for Directory Chairs” for more information. **Any logo or advertising from an ongoing business is NOT DISTRIBUTABLE to students.**
- Bylaws and Standing Rules – The Area 15 Directory guidelines include a percentage of points for inclusion of your local unit Bylaws and Standing Rules. If your distribution list is to PTA members only, having these documents will be very helpful to your membership. If the directory goes to others outside of the PTA, you may want to consider a Bylaws insert for your membership.
- Disclaimer – PTA Directories are for the private use of the recipients and should never be sold or distributed outside of your school families. Be sure to include a disclaimer printed in your directory (*see Helpful Hints for an example*). Some local units are considering a digital version of their directory or a link to the information on their website. Be sure you are clear on privacy policies from PISD and have your principal's approval.

### WHERE DO I GET THE INFORMATION I NEED TO INCLUDE?

- Personal student information – Many schools include a section on their PTA membership form for individuals to indicate that they would like their personal information (name, phone #, address, students, email) included in the school directory. A signature line is also included for the individual's signature to show that the PTA has permission to do so. The point is that you need to have permission from an individual before you include their information. The necessary form is attached. (*Discuss Privacy and Distribution guidelines for 2008*)
- PTA information – Your school's PTA president and various board members should be able to provide PTA information specific to your school, such as PTA meeting dates for the year and programs scheduled by the PTA. The PISD Council of PTAs website is a great first point of contact beyond your school's PTA

([www.planopta.org](http://www.planopta.org)). And, your Area PTA, the Texas PTA, and the National PTA each have a website where you can obtain other PTA information ([www.area15.txpta.net](http://www.area15.txpta.net), [www.txpta.org](http://www.txpta.org), [www.pta.org](http://www.pta.org)).

- **PISD Information** – Information related to the school district, such as the school calendar and school board members, may be found at [www.pisd.edu](http://www.pisd.edu).
- **State education and legislator information** – The state of Texas has various websites that include information regarding the State Board of Education and our legislators - [www.tea.state.tx.us](http://www.tea.state.tx.us), [www.senate.state.tx.us](http://www.senate.state.tx.us), and [www.house.state.tx.us](http://www.house.state.tx.us) are a few.

### **WHEN DO I GET STARTED ON THE DIRECTORY?**

- **You will never receive 100% of the permission forms for information for the Directory. Set a deadline and stick with it!**
- Work backwards from the distribution date to plan the start date
- Include updates and corrections in PTA newsletters if necessary.

### **WHAT SOFTWARE SHOULD I USE?**

- **MSWORD, MSEXCEL, MS Publisher, etc.** – The choice is up to you. Choose software that you are comfortable using. And if your successor will be using it, too, make sure the software is readily available and not too complicated for new users to learn. You also need to consider what software will work best for the way you are laying out and binding the directory pages together.

### **WHAT OPTIONS DO I HAVE FOR BINDING THE PAGES TOGETHER?**

- **Staples, tape binding, spiral binding, etc.** – The PISD print center provides several options with a different cost associated with each type of binding. A current print center request form shows the costs, or you may contact the print center directly using the phone number on their form. Other printing companies may provide additional options, such as spiral binding.
- Be sure to price out binding options before you start the layout. Some bindings require wider margins than others.

### **IS PROOFREADING THE DIRECTORY REALLY THAT IMPORTANT?**

- **YES! YES! YES!** – It is best to have a “fresh” set of eyes review the final draft of the directory before it goes to print. Some PTAs have multiple individuals take a set of pages to review and correct. Make sure to include time for proofreading when you are determining when your directory will be available. If you are using a database from the previous year, be sure to delete any families that did not turn in a permission form for the current year.
- **PTA President and School Principal review** – Have your PTA president and school principal review the directory before having it printed. Make sure to include time for their review and making any needed edits as well when determining when your directory will be available.

### **WHERE DO I HAVE THE COPIES OF THE DIRECTORY PRINTED?**

- **PISD print center** – The PISD print center may be used to print your directory, and most likely they provide the lowest cost. However, you are not required to use their services.
- **Other** – You may use any other copy center or printing company you choose, just make sure you check on the printing options, costs, turnaround time, etc. before doing so.

### **WHAT GOES IN MY PTA *PLAN OF WORK* FOR THE DIRECTORY?**

- **Specific Steps** – Include a list of the steps you will take to complete the directory along with the specific date each step will be completed. This helps you get organized and stay on track. Distribution should be as early as possible – October or November. When you distribute the directories, go ahead and mail one to the Area Directory Chairman, the Area 15 President, and the Council Directory Chairman. You do not have to wait until the March deadline.
- **Budget** – Include any items for which an expense is incurred. Don't forget to include the costs for such items as printing the directories, the supplies you use when creating and printing rough drafts of the directory (paper and ink cartridges), postage to mail copy a copy of your directory to our Area PTA for judging, any distribution expenses (envelopes, recipient address labels).
- **Sponsors** – Even if you have sponsors who are paying your PTA to be listed in the directory, you still need to include ALL costs in your budget for expenses and income. (*see Sponsorship section on Helpful Hints*)

## **HOW DO I DISTRIBUTE THE DIRECTORY TO EVERYONE?**

- PTA meeting – Directories could be distributed at a PTA meeting if one is scheduled close to the time the directory is being released. You must also consider whether or not most recipients will be attending the meeting and how to distribute remaining directories.
- Before or After School - As designated by the Principal, and in the car-pool line.
- Adult to Adult – During the school day in the office or foyer as designated by the Principal.
- Mailing – It may be easier to mail the directories directly to the members. If this is the case, be sure to include envelopes, labels and postage in either your Directory budget or Bulk Mailing.

## **WHO CAN HELP ME IF I HAVE A QUESTION?**

- Your school's PTA – Start with resources within your own PTA and school if you have a question. Also, it may help to refer back to previous directories created at your school or make a call to the individual who was in charge of creating last year's directory. You may also prefer to have a committee of individuals to work on your directory – discuss questions with your committee. However, if you cannot find the answer, don't hesitate to use other resources as listed below. (*Council Directory Chairman's business card*)
- Your PISD Council of PTAs Directory Chairman - This individual should be able to answer your questions or help research the answer for you. That is part of their job description! Chances are if you have a question, there are others who will have the same question. The directory chairman can then pass the information on to each school PTA if necessary. (Website: [www.planopta.org](http://www.planopta.org) or Email: [directory@planopta.org](mailto:directory@planopta.org))
- Your Area PTA Directory Chairman – If the Council Directory Chairman is unable to help, you or the chairman may need to contact our Area PTA Directory Chairman.